ORIGINAL PAPER

Re-using archived qualitative data – where, how, why?

Louise Corti

1
2 **Abstract** "Qualitative data" are the central issue of this article. Qualitative data
3 are a particular category of data within the social sciences, where data have been
4 predominantly of a quantitative nature. Qualitative data could enrich social science
5 research in many ways. The re-use of this particular group of data is however a new
6 challenge for social science data archives. A new methodology has to be developed
7 when dealing with these data, based on a combination of social science methodology
8 and traditional archival descriptions. An additional question discussed in the article
9 is what the best place should be for archiving and disseminating qualitative data: in
10 research (social science) data archives or in the more traditional libraries and
11 archives?

12 **Keywords** Archives · Data · Research data · Qualitative data · Data archives ·
13 ESDS · UKDA · Secondary analysis of data · Methodology · Data provision ·
14 Social science

15 Introduction

16 Archived qualitative data are a rich and unique, yet too often unexploited, source of
17 research material. Qualitative data are collected across a range of social science
18 disciplines and typically aim to capture lived experiences of the social world and the
19 meanings people give these experiences from their own perspectives. They offer
20 information that can be reanalysed, reworked, and compared with contemporary
21 data. In time, too, archived research materials can prove to be a significant part of
22 our cultural heritage and become resources for historical as well as contemporary
23 research. While there is a well-established tradition in social science of reanalysing

L. Corti (✉)
ESDS (Economic and Social Data Service) Qualidata,
Outreach and Training, UK Data Archive at the University of Essex,
University of Essex, Colchester CO4 3SQ, UK
e-mail: corti@essex.ac.uk

🖄 Springer

	Journal : 10502	Dispatch : 14-12-2006	Pages : 20
	Article No. : 9038	☐ LE	☐ TYPESET
	MS Code : ARCS633	☐ CP	☐ DISK

24 quantitative data, there is not yet a well-developed paradigm, nor an evident
25 blossoming research culture, for secondary qualitative data analysis. The lack of
26 discussion in the current literature on the benefits and limitations of such approaches
27 is evident. This paper discusses some of the methodological, ethical and theoretical
28 considerations relating to the secondary analysis of qualitative data.
29 The second part of this paper addresses more pragmatic issues involved in the
30 acquisition, preservation, dissemination of and support for qualitative data. An
31 overview of some of the key challenges faced by an archive for acquiring and pro-
32 cessing qualitative data collections will be provided. Where best do qualitative data
33 collections sit? In traditional libraries or paper archives alongside historical docu-
34 ments, or as part of more holistic digital collections of contemporary social science
35 research resources? This question relates to data accessibility and dissemination,
36 cataloguing methods, user documentation and finding aids, and outreach and
37 training strategies that promote the use of qualitative data archives. ESDS
38 (Economic and Social Data Service) Qualidata will be used as a case study to
39 contextualize this debate.

40 **Kinds of qualitative data available for secondary analysis**

41 Often a diversity of methods and tools rather than a single one are encompassed.
42 The types of data collected vary with the aims of the study and the nature of the
43 sample. Samples are most often small, but may rise to 500 or more informants. Such
44 data include interviews—whether in-depth or unstructured, individual or group
45 discussion—fieldwork diaries and observation notes, structured and unstructured
46 diaries, personal documents, or photographs. For the sake of a simple definition of
47 'qualitative' any research material that is collected from studying people can be
48 included, unless it has been transformed into numerical values (e.g. in a spread sheet,
49 database or statistical software), in which case it becomes quantitative.
50 Thus any one study may yield a wide range of data types for archiving. Moreover
51 most of these types of data may be created in a variety of formats: digital, paper
52 (typed and hand-written), audio, video and photographic. But, increasingly data are
53 now "born digital" data in the sense that the text is word-processed, and audio
54 recordings are collected and stored as MP3 files.
55 In Britain, the 1950s onwards saw an unprecedented growth of quantitative and
56 qualitative social research resulting in the spread of its themes and the development
57 of its methods. From the 1960s into the 1970s, sociology was not only an excep-
58 tionally popular subject with students, but was also given more national research
59 resources than at any time before or since. This enabled social researchers to carry
60 out studies of a scale unlikely ever to be equalled. An example is Peter Townsend's
61 in-depth investigation into the nature and status of older people's institutions in
62 post-war Britain. The publication resulting from this research, *The Last Refuge*
63 (Townsend 1962) was considered a pioneering piece of research when it was pub-
64 lished in 1957 and attracted much publicity for its focus on an important and hitherto
65 neglected area of policy, and also for its methodology and its policy recommenda-
66 tions. But Peter Townsend's meticulously preserved fieldwork descriptions of old
67 people's institutions and accompanying interviews, now archived and available to
68 researchers at the University of Essex, are equally significant. Not only do they
69 provide a rich descriptive context of policy at that time, but they also represent a

70 glimpse behind the final polished policy reports—exposing how the researcher
71 approached the study and the methods he used.
72   Clearly the scope and format of data usually determine its potential for secondary
73 analysis. For example, data from a research study that collected, recorded and
74 transcribed a hundred or so in-depth interviews and documented detailed field notes,
75 particularly when based on a clear sampling strategy, are much more likely to be
76 useful than a small focussed set of interview notes from twenty or so brief semi-
77 structured interviews. These have more limited re-use value as the final publications
78 will usually have 'mined' the limited data quite thoroughly, offering less new use
79 value. But as with many archived sources, sometimes the most exciting discoveries
80 arise from re-examining material which hitherto has not been thought worth
81 researchers' attention. David Zeitlyn argues that field photographs and audio-visual
82 material are probably among the most prolific and least exploited resources
83 produced by anthropologists (Zeitlyn 2000).

The availability of qualitative data for re-use

85 If we take a look across the world in an attempt to identify qualitative data sources
86 that could be openly consulted, we immediately encounter problems. The first is the
87 absence in most countries of any national effort to either gather together or draw
88 attention to existing research sources. The second is the lack of infrastructures and
89 also of agreed practical procedures for preparing, storing and disseminating
90 qualitative data.
91   Throughout the world there are innumerable archives which collect (mainly
92 historical) qualitative material, as well as a large number of sound archives and
93 ethnographic archives, but there are few common descriptive standards, access to
94 many collections is poor, and there are no integrated resource discovery tools. For
95 example, while university repositories may hold a Professor's research interviews
96 from past investigations, they are often buried away in the boxes of personal papers,
97 and the hand-lists typically provided by such archives are not at all conducive to
98 locating the raw data. Moreover, many are still not digitised. Corti and Thompson
99 (2004) describe the general availability of qualitative data sources around the world,
100 and discuss local and national local archival initiatives arising over the past decade.
101   One of the earliest and perhaps best known sources in Britain is the collection of
102 papers resulting from the 1930s social research organisation, *Mass-Observation*.
103 These were established as a notably well-organised and accessible public archive at
104 the University of Sussex in the early 1970s, and since then have attracted a significant
105 number of researchers (Sheridan 2000). More typically, other data collections that
106 were retained were stored as in-house research resources, such as the Berkeley and
107 Oakland cohorts collected from the 1920s to the 1990s at the Institute for Human
108 Development at Berkeley. It has also been not unusual for the papers of eminent
109 scholars, sometimes representing a lifetime's research, to be transferred on retire-
110 ment to their local university archives. Such papers may include not only primary
111 research data, but also administrative documents about the research, such as grant
112 proposals and correspondence. A collection may also contain 'secondary' sources
113 utilised for a particular research study, such as newspaper clippings, organisational
114 or medical records. But, more generally, attempts to archive qualitative research
115 material were both rare and unsystematic. Since the 1990s new technologies have led

116 to new possibilities for sharing qualitative data, especially through online resources
117 and databases.

National archiving

119 In Britain, as indeed in most western countries, until recently no infrastructure
120 existed for the systematic archiving and dissemination of qualitative data from social
121 science research. The UK's Economic and Social Research Council (ESRC; then
122 SSRC) had already recognized from very early on in 1967, the value in retaining the
123 most significant machine-readable data from the empirical research which it funded
124 by establishing a national Data Archive. Since the 1970s, national social science data
125 archives have been formed across the world acquiring a significant range of data
126 relating to society, both historical and contemporary, from sources including surveys,
127 censuses, registers and aggregate statistics. These have become centres of expertise
128 in acquiring, describing, sharing, providing access to and preserving data. Interna-
129 tional networks of data services have been established for the social sciences which
130 foster co-operation on key archival strategies, procedures and technologies.
131 Thus crucial survey data can be re-analysed by other researchers, and the money
132 spent on research has become not only an immediate outlay but an investment for
133 the future. There was, however, a significant gap in this policy in that qualitative data
134 were rarely acquired, even when much interview data became transcribed in word
135 processed form. This was largely because non-numerical data were simply not
136 viewed as 'data'. Nor was there any willingness on the researchers' part to share their
137 qualitative data. When a small pilot study commissioned by the ESRC was carried
138 out by Paul Thompson in 1991 (Thompson 1991), it was revealed that 90% of
139 qualitative research data was either already lost, or at risk, in researchers' homes or
140 offices. However the ten percent 'archived' were found not to have the basic
141 requirements of an archive, such as physical security, public access, reasonable
142 catalogues, with recorded material or listening facilities. It was further calculated
143 that it would have cost at least £20 million to create a resource on the scale of that at
144 risk. For the older British sociological material, moreover, the risk was acute, and
145 the need for action especially urgent. This was borne out by the very recent
146 destruction of research data on the classic British community studies of Banbury
147 (Stacey 1974); on race and conflict in Sparkbrook (Rex and Moore 1967).
148 In 1994, with support from the ESRC, the first UK qualitative data archiving
149 project on a national scale was established at the University of Essex. It was set up as
150 a small unit based in the Department of Sociology under the direction of a member
151 of the department, Paul Thompson, an eminent oral historian. Its first task was a
152 rescue operation aiming to seek out the most significant material created by research
153 from past fifty years. The second was to work with the ESRC to implement a
154 Datasets Policy (ESRC 2002) to ensure that for current and future projects the
155 unnecessary waste of the past did not continue. Qualidata was not set up as an
156 archive itself, but as a clearing house and an action unit, its role being to locate and
157 evaluate research data, catalogue it, organize its transfer to suitable archives across
158 the UK, publicize its existence to researchers and encourage re-use of the collections
159 (Corti et al. 1995; Thompson and Corti 1998).
160 In the mid-1990s, the Qualidata unit pioneered systematic procedures for
161 archiving and disseminating qualitative data within a meaningful international social

162 science framework, rather than using purely historical archival practises. Traditional
163 archival 'box' listings do not utilise any consistent terminology in identifying or
164 describing the 'data' elements of a personal paper collection. Thus resource dis-
165 covery across collections, such as a search for 'field notes from the 1970s in the area
166 of health', is not possible. Data types certainly cannot be distinguished from an
167 archival repository listing.
168   The procedures included: sorting, processing and listing both raw data and
169 accompanying documentation (metadata); systematically describing studies for web-
170 based resource discovery systems; establishing appropriate ethical frameworks and
171 mechanisms of access; and training in the re-use of qualitative data (Corti 2000,
172 2002). These were developed from working closely with traditional archivists and
173 data archivists. A number of test data sets were used to establish which descriptive
174 schema matched the needs of a data collection-based archive and what kinds of
175 descriptive elements met users' needs.
176   By 2005, Qualidata has acquired, processed and catalogued over 140 datasets, and
177 catalogued a further 150 already housed in archives across the UK. Surviving
178 ''classic studies'' data from key researchers were also rescued, including well-known
179 British projects such as Elizabeth Bott's study on *Family and Social Network* (1956);
180 John Goldthorpe et al.'s *The Affluent Worker* (1968); Stanley Cohen's *Folk Devils*
181 *and Moral Panics* (1971); the entire life's work of pioneering UK researchers such as
182 Peter Townsend's *Family Life of Old People* (1957), *The Last Refuge* (1962) and
183 *Poverty in the UK* (Townsend 1979); and Paul Thompson's life-history interview
184 studies of *The Edwardians* (1975) and *Families, Social Mobility and Ageing, an*
185 *Intergenerational Approach* (Thompson et al. 1990). Thompson and Corti (2004)
186 provide an introduction to a selection of talks by some of these leading pioneers of
187 UK social research given at a symposium in 2000. From 2001, Qualidata began a new
188 life as a specialist unit housed within the UK Data Archive (UKDA) at the
189 University of Essex, with a focus on acquiring and distributing digital data. The
190 practical aspects of acquiring, preparing, providing access to and supporting users of
191 digital qualitative data through such an archive set up are described later.
192   In the US, there is also a centre that has been systematically gathering qualitative
193 as well as quantitative research data in order to make it available to other social
194 science researchers. Founded in 1976, the Murray Research Center: a Center for the
195 Study of Lives is a national repository for social and behavioural science data on
196 human development and social change, with special emphasis on the lives of
197 American women (James and Sorenson 2000). The archive holds more than 270 data
198 sets with a wide range of topics, samples, and designs.
199   Finally, over the past few years there have been a number of other initiatives
200 across the world that have sought to establish national archiving projects for qual-
201 itative research data. The national (mostly survey-based) Social Science Data
202 Archives in Finland (Kuula 2000), Germany (Opitz and Mauer 2005), Switzerland
203 (Eberle 2004), Denmark (Fink 2000), The Netherlands and Canada have been
204 conducting preliminary investigations into extending the scope of their own
205 collecting.
206   The accumulation of documented and available qualitative data resources has
207 thus encouraged the take-up of secondary analysis. Greater re-use of data also
208 reflects some of the efforts invested in promoting or re-packaging data collections to
209 meet researchers', teachers' and students' needs. And, as resources grow and the
210 promotional machines grind into action, so experiences of secondary research have

211 begun to find their place in social research literature, as the reflections in the FQS
212 Special Issue on *Secondary Analysis of Qualitative Data* testify (Corti et al. 2005a).
213 So, what can secondary analysis of qualitative data offer the researcher?

214 The potential of data for secondary analysis

215 Archived qualitative data exist to be re-used, revisited, reanalysed and compared
216 with complementary data sources. There is a well-established tradition in social
217 science of reanalysing quantitative data, although the skills base of statistically
218 literate people continues to be under-developed. However, among qualitative
219 researchers, to date, there has been no similar research culture that actively
220 encourages new researchers or students in the social sciences to conduct reanalysis of
221 data collected by other researchers. Until very recently there has been a distinct lack
222 of public discussion of the issues involved and very little published "evidence" of the
223 benefits and limitations of such an approach.
224   The re-use of qualitative data provides an opportunity to study the raw materials
225 of recent or earlier research to gain both methodological and substantive insights,
226 which are described later. Because new data are typically expensive to collect, using
227 existing sources will save costs by avoiding duplication of research effort.
228   Corti and Thompson (2004) have already identified six approaches to re-using
229 data which are described in relation both to theoretical issues raised more recently
230 about re-analysis, and to the actual experiences of researchers. The authors expound
231 the methodological, ethical and theoretical considerations relating to the secondary
232 analysis of such qualitative data. Other contributions to the literature addressing
233 these same issues have also begun to appear over the past few years (see Corti and
234 Thompson 2004; Corti et al. 2004; Heaton 2004, Hammersley 1997; Corti 2000;
235 Fielding and Fielding 2000; Thompson 1998; Szabo and Strang 1997).
236   The ways that qualitative data can be re-used are not dissimilar from those
237 familiar for the secondary analysis of survey data. Indeed, the approaches have much
238 in common with those familiar for the secondary analysis of survey data.

239 Description

240 The possibilities for using data descriptively are extensive—pictures of contempo-
241 rary and historical attitudes and behaviour of individuals, groups and organisations,
242 or societies can be gleaned. Indeed, significant data created now will in time become
243 a potential historical resource. The oral testimonies of ordinary men and women can
244 complement official and public sources such as newspapers and government reports,
245 and such evidence can also be used to document individual lives from a biographical
246 perspective, including those of significant researchers themselves. Sheridan (2000)
247 notes how the material from the UK's Mass Observation has been used not only to
248 provide historical evidence, but also to examine the role of the Mass Observation
249 study itself in the social, political and cultural milieu of the 1930s and 1940s. His-
250 torical research methods thus become important here, and re-use of these materials
251 will require the new investigator to first evaluate the evidence, examine its prove-
252 nance, and assess the veracity of the sources. This may be a new practice for
253 contemporary social researchers (Kynaston 2005). But original context is hard to

254 capture, and this is one of the major arguments voiced against re-use of others' data.
255 This point and attempts to remedy the problem is further elaborated later.

256 Comparative research, restudy or follow-up study

257 Qualitative data can be compared with other data sources or be used to provide
258 comparison with other contexts, over other periods of time, and across other social
259 groups and cultures. In Britain the original returns of the population census were
260 kept as public records and have proved an invaluable basis for consultation in recent
261 years. Sidney and Beatrice Webb (1894), on completing their pioneering study of
262 British trade unionism, archived their field notes from their national sample of
263 interviews, which still feature as the principal source of information on trade
264 unionism in the late 19th century. Equally well known early classic restudies include
265 Seebohm Rowntree's (1901) repeated surveys of poverty in York and Hubert
266 Llewellyn Smith's (1930–1935) repeat of Charles Booth's (1891–1902) poverty
267 survey in London. In anthropology a classic example is the controversial restudy and
268 reinterpretation by Oscar Lewis (1963) of Robert Redfield's (1930) research on
269 the village of Tepotzlan in Mexico. But the restudies made use of the published
270 methods, not necessarily the raw paper data.
271   Comparison brings greater power to answer research questions, for example when
272 a dataset can be combined with data beyond its own sample or geographical limi-
273 tations. Equally, samples from original studies that have been preserved can be
274 followed up, typically with the involvement of the original investigator, and some-
275 times with new ethical approval. An example is Glen Elder's *Children of the Great
276 Depression* (1974), based on both new fieldwork and a reorganisation of the earlier
277 interviews and participant observation of the Berkeley and Oakland cohorts inter-
278 viewed on a regular basis since the 1920s, archived by the Murray Research Centre.
279 Follow-up studies typically require approval from a research ethics committee, as it
280 involves re-contacting original participants who may not have been expecting con-
281 tact from new researchers. In addition, particularly in the health field, original
282 investigators are often keen to become collaborators, rather than just being cited as
283 the original data collectors (Corti and Wright 2002).

284 Re-analysis or secondary analysis

285 Reanalysing qualitative data allows both for re-interpretations and also for new
286 questions to be asked of the data. Julie Charlesworth and Janet Fink (2001) draw
287 upon original research data from Peter Townsend's study of institutional care
288 published as *The Last Refuge* (Townsend 1957), to illustrate the potential which this
289 archived data holds for the analysis of such topics related to workplace and organ-
290 isational dynamics. Alternatively, new angles can be applied and new methods
291 employed which may not have been possible at the time of the original data analysis.
292 Sometimes new analytical tools can highlight parts of data that were previously
293 ignored in the original analysis, offering the chance to revisit and reanalyze material,
294 even if already written up (Akerström et al. 2004). Typically, the richer the original
295 research material, the more potential there is for further exploitation.
296   Nigel Fielding and Jane Fielding (2000) revisited Stan Cohen and Laurie Taylor's
297 (1972) original analysis of long-term imprisonment of men in maximum security
298 published as *Psychological Survival*. Their restudy highlights the value of secondary

299 analysis in addressing sensitive topics or hard to reach populations, by extracting the
300 maximum value from those studies which are able to negotiate access.
301   In the US, research using the Murray Research Centre data collection demon-
302 strates the ways that qualitative data can be restructured for new research, for
303 example creating new prospective studies out of existing ones and combining mul-
304 tiple data sets for multi-cohort designs. Jacqueline James and Anamette Sørensen
305 (2000) discuss how the original transcripts of in-depth interviews, observations, and
306 responses to tests, can be especially valuable in applying different perspectives and
307 renewed scoring procedures to the original data.

308 Research design and methodological advancement

309 A study of the research methods of an original research investigation, such as the
310 sampling methods, data collection and fieldwork strategies and interview guides of
311 earlier research can help in the design of a new study or the development a meth-
312 odology or research tool. Paul Thompson reflects on the role of drawing on existing
313 interview guides designed by earlier researchers in a similar field (Savage 2005; Corti
314 and Thompson 2004; Thompson 2000b).
315   There is a growing emphasis on publishing methodological details in reports, and
316 books, but all too often the details offered are frustratingly brief and sanitised. One
317 of ESDS Qualidata's roles, as we shall see later, is to try to encourage and devise
318 better strategies for capturing the methodological perspectives and details under
319 which studies are undertaken (across all stages) thereby providing greater context
320 for a secondary user who may be unfamiliar with a set of raw data. Researchers' own
321 research notes and fieldwork writings can offer much insight into the history and
322 development of the research and also help inform new thinking.

323 Verification

324 Archived data can be scrutinized with scientific rigour to support or challenge a set
325 of findings or to appraise the method. The practice of opening data for inspection is
326 becoming increasingly important in the natural sciences, with the aim of encouraging
327 more transparent research. We have also seen in the UK the recent start up of
328 training in master classes on verification in the field of quantitative economics,
329 the *Replication Workshop—Estimating Time-Series-Cross-Section Models with*
330 *Comparative Political Economy Data* (ESRC Oxford Spring School). This initiative
331 is funded through the ESRC Research Methods Programme, which has a strong
332 training component aiming to improve the standards of research methods across the
333 UK social science (RMP Website 2005).
334   Martin Hammersley (1997) discusses the benefits and weaknesses of using
335 ''replication'' to check findings, arguing that true scientific replication is not possible
336 as studies generally do not have equal social phenomena. Restudies suffer from
337 differences in time and the researchers' subjective perspectives, but well-
338 documented data sets can help the new investigator to reconstruct the evidence by
339 re-tracing the original analytic steps. Hammersley (1997) and others correctly argue
340 that replication is not an appropriate objective for secondary analysis, partly because
341 of the problem of context. The loss of the holistic context of a study means that it is
342 unlikely that the research process could ever be made fully explicit—the path of
343 qualitative analysis is never linear, and almost always involves a degree of trial and

344 error in the pursuit of interesting lines of investigation. Retention of the original
345 coding frames and analytic notes means that these can be reapplied by another
346 investigator. Nigel and Jane Fielding (2000) further suggest that qualitative software
347 may help the process of verification. We discuss the use of Computer Assisted
348 Qualitative Data Analysis (CAQDAS) software (such as Atlas-ti or N-Vivo) in the
349 teaching of secondary analysis later on in this paper.

350 Teaching and learning

351 The use of real-life data in teaching substantive or methodological perspectives in
352 the social sciences adds interest and relevance to courses. Students who gain their
353 experiences of data analysis from the use of archived data from published studies can
354 gain a good understanding of the complexity of data analysis as it relates to the
355 ''real'' world. Students gain the opportunity to understand the rationale for col-
356 lecting data and can develop critical faculties to judge the strengths and weaknesses
357 of a particular data collection strategy or analytic approach. Data can be chosen to
358 be of particular relevance to the subject being taught and thus can bring both
359 substantive and methodological topics alive.
360   Older 'classic' studies in the social sciences and more contemporary focused sets
361 of transcripts along with supporting documentation can provide valuable material
362 for social science teaching, both in research methods and in substantive areas. Stu-
363 dents can learn many fundamental aspects of qualitative research, and the theo-
364 retical and methodological strategies that helped to create chosen datasets, while
365 also gaining first-hand experience of critically re-analysing and comparing data from
366 well-known sources. Learning about the work of researchers who have made a
367 significant impact in their field allows young researchers to take the best practice
368 elements from this work and further develop them in their own research work
369 (c.f. Zeitlyn 2000). Examples of using qualitative data in teaching and learning are
370 discussed by Corti and Bishop (2005).

371 Difficulties in re-using data

372 But the practice of secondary analysis of qualitative data is not a commonplace
373 research activity. There appears to be different and perhaps more challenging
374 intellectual, epistemological and practical problems for the user to consider com-
375 pared to confronting numeric data, although re-use of any dataset collected by a
376 third party can be beset with complexity. Why has there been a reluctance to draw
377 on material created by other researchers? Is it that it is a problem of the implicit
378 nature of qualitative data collection and analysis? Or is it a question of lack of time
379 to get fully acquainted with research materials created by someone else? How
380 constraining is informed consent? And what about scientific verification—is there
381 insecurity about the exposure of one's own research practice? The recent, though
382 sparse, literature points to a number of key concerns regarding the practice of
383 re-using qualitative data.
384   However, in discussing the issues directly with qualitative researchers, it appears
385 that the views are by no means homogenous. In fact, when asked what, if any,
386 barriers existed to further exploitation of data by a secondary analyst, responses
387 varied from overt support for sharing one's own data to vehement displeasure at the

388 thought of being asked to share a 'possession' considered to be of personal value
389 (Corti et al. 1995; Corti 2000; Fink 2000).
390   The key issues that present themselves as difficulties in both re-using and sharing
391 data are 5-fold, as identified by Corti and Thompson (2004). These are ethical and
392 consent considerations; representation, coverage and context of the research and
393 fieldwork; unfamiliarity with the methods; lack of infrastructure for data-sharing;
394 misinterpretation of data; threat to intellectual property rights. For a discussion on
395 ethics, see Corti et al. (2000) and see the ESDS Qualidata web pages on this topic
396 (ESDS Qualidata website 2004).

397 The architecture of data provision: traditional archive repository
398 versus data archive

399 In the earlier debates as to how to operate the UK national qualitative archive, two
400 models of data storage and provision were identified: a centralised facility in a single
401 location or a hub and spokes model. These are of course extreme models repre-
402 senting opposite ends of the spectrum. The UK Qualidata was established using the
403 latter approach, with the Centre as the hub, bearing responsibility for evaluating,
404 acquiring, preparing, documenting, setting access conditions, transferring and pub-
405 licising data. A network of traditional archives, largely situated in University
406 libraries, acted as spokes which enabled the long-term storage of data. For Quali-
407 data's initial stages, when most of the research data handled were paper-based, it
408 was very clear that a distributed or 'clearing house' model had costs savings over a
409 centralised one. All the long-term costs of maintaining this paper-based material
410 have been off-loaded to the archives which have agreed to house the data, and
411 ESRC has been saved the mounting expense of maintaining its own central archive
412 with appropriate storage conditions, trained archival staff, maintaining facilities for
413 research users, etc.
414   However, this era is almost over. We see now that there are scarcely any new
415 datasets in the UK to archive, which are not available in electronic form, or do not
416 already now sit in national archives. As knowledge about deposited sources of data
417 increases, so do requests for help in finding and obtaining suitable datasets.
418   Should data reside in one place or be dispersed? The former can ensure
419 standards—in terms of data quality, preservation and controlled access, whilst the
420 latter places the emphasis on the distribution of material to a network of high-class
421 traditional archives, many chosen because they are at centres of high research
422 activity in particular fields. It may be that the ideal solution for the (predominantly
423 digital) future can combine both models, with data stored both centrally and locally
424 giving a double benefit to a host of dispersed and disparate user communities.
425   Descriptive systems also differ between the two communities. An archivist will
426 typically catalogue a collection, say of a retired sociologist's papers by chronology,
427 perhaps subdividing them into periods when the person held different professional
428 roles. By contrast, a data archivist will identify and pull out the distinct research
429 studies and catalogue them at the study level. This has implications for users tapping
430 into finding aids. Typically, the user of qualitative data is a social scientist, rather
431 than a historian, and thus study level description is critical because they wish to
432 re-analyse or replicate a study, as discussed earlier. Because many empirical
433 undertakings are now utilising mixed methods strategies in their research design, it is
434 even more crucial to describe data at the study level to cover, for example, both

435 numerical datasets and qualitative interview materials. The traditional archive
436 community uses the international cataloguing standard, the General International
437 Standard Archival Description ISAD(G) while the data archiving community use
438 the Data Documentation Initiative (DDI) (ISAD(G) 2000; DDI 2005). While some
439 of the descriptive elements map, they follow the different logic of the communities'
440 own practices: personal or corporate fonds typically by chronology versus unique
441 study or data description.

UK National Qualitative Archive: ESDS Qualidata

443 From 2001, the original Qualidata unit, mentioned earlier, began a new life as a
444 specialist unit housed within the UKDA at the University of Essex, with a focus on
445 acquiring and distributing digital data. The key drivers behind merging the data
446 services were multi-fold: the desire to create a one-stop social science data shop built
447 around a single hub giving Essex a unique portfolio of data expertise and techno-
448 logical vision; the need to strengthen alliances to meet a tendering process ensuing
449 from the ESRC's strategic review of their data archiving and dissemination services;
450 the wish to streamline and simplify the data deposit process for ESRC depositors;
451 and a growing need to reduce the demarcation between qualitative and quantitative
452 data.
453   As Qualidata did not physically hold all the data it publicises in its catalogue,
454 other than having a degree of access control over the local paper based archive at
455 Essex (the National Social Policy and Social Change Archive collection), users
456 are often put off by the fact that they may, for example, have to travel to
457 Scotland to access a single dataset based in a Scottish Repository. Moreover,
458 Qualidata previously found itself having to acquire data on the user's behalf, for
459 example by arranging to get copies made for and dispatched to a user. In the
460 short-term, there was no getting round users having to visit archives in person to
461 access large paper-based collections, as repositories are in no position to digitise
462 all their holdings.
463   Without the merger, the Qualidata service, which was set up as a small pilot
464 service, would probably not have survived in the longer term. Phase I of the inte-
465 gration process was complete by October 2001, when many of the strategic and
466 operational procedures for data acquisition, processing, metadata creation and dis-
467 semination were merged in to sit along side the handling of numeric data. Cross-
468 divisional training of personnel of the merged organization was initiated to broaden
469 data processing skills to cover a wider range of data types, including mixed methods
470 datasets.
471   ESDS Qualidata is now a specialist service of the broader UK Economic and
472 Social Data Service (ESDS) led by the UKDA at the University of Essex. The ESDS
473 is a national data archiving and dissemination service that came into operation in
474 January 2003. The service is a jointly funded initiative sponsored by the Economic
475 and Social Research Council (ESRC) and the Joint Information Systems Committee
476 (JISC) and provides access and support for an extensive range of key economic and
477 social data, both quantitative and qualitative, spanning many disciplines and themes.
478 The dedicated qualitative data service provides access and support for a range of
479 social science qualitative datasets and is responsible for generating a number of data

480 enhancements, and for providing information and training resources that focus on
481 strategies for re-analysing qualitative data.
482   The focus is on acquiring digital data collections from purely qualitative and
483 mixed methods contemporary research from a wide range of social science disci-
484 plines and from UK-based ''classic studies'', which are typically post-war studies of
485 British society. Data supported include: in-depth and semi-structured interviews;
486 focus groups; field notes and observations; personal documents and photographs. All
487 data are considered, either proactively or reactively, but the main inflow is via ESRC
488 research grants, through which primary data are collected. Thus from an acquisitions
489 point of view, the UKDA has been fortunate in that it has been sufficiently sup-
490 ported to build up both a viable operation and a stock of data through the frame-
491 work and infrastructure of a national policy for archiving data. As such, this UK
492 model, that is now, thankfully, beyond its probation phase, offers a pioneering
493 exemplar to other countries as to how to enable the systematic collection and
494 secondary use of qualitative data.
495   ESDS Qualidata plays a pivotal role in working closely with data creators to
496 ensure that high quality and well-documented qualitative data that have longer-term
497 value are produced. As part of its core functions, both general guidance and a
498 dedicated advisory service are provided for data creators and depositors on research
499 project management, issues of confidentiality and consent, and documentation of
500 data for archiving. Taken seriously at the start of a research project, good practice
501 across these areas extends the usability lifetime of data and potentially enables
502 creative and flexible re-use of data.
503   ESDS Qualidata, and indeed, the Murray Research Center, have acquisitions
504 policies to ensure that all materials deposited meet certain criteria: that data are
505 documented to a minimum standard, are in appropriate formats, are complete, and
506 that confidentiality, data protection and copyright issues have been addressed.
507 Priorities must also be assigned to data, so that the inflow of data meets the resources
508 available for processing. Potential studies are thus always evaluated from a long-
509 range perspective to predict their future value. Priorities focus on:

510 • the historical value of the study
511 • data complementary to existing data holdings
512 • data that have further analytic potential than the original investigation, i.e. have
513   not been exhaustively analyzed
514 • data based on large-scale national samples
515 • data which are longitudinal in design
516 • the possibility of further follow-up of the sample
517 • mixed methods data
518 • studies that include a wide range of measures

519   Finally, ESDS Qualidata offers a resource discovery hub via the UKDA online
520 catalogue that holds some 4000 data collections across the disciplinary and meth-
521 odological spectrum. The catalogue also points to other accessible sources of qual-
522 itative data across the UK not physically held by the UKDA. The service continues
523 its earlier role in facilitating the preservation of important large paper qualitative
524 research collections (for deposit in traditional paper archives), top level cataloguing
525 and, where appropriate, digitizing samples of these collections.

Qualitative data enhancement: digital collections, rich data documentation and online data access

Users of qualitative data want instant access to data and they want more than just one collection. But simply preserving and disseminating the original research documents is not enough. Enhancing qualitative data is one of the keys to increasing visibility and enabling easier and more effective use by researchers and teachers. This does not mean changing raw data in any way it simple means adding value to data by providing enhanced resource discovery and richer comprehension about the data and its provenance.

In the context of archiving qualitative data, for ESDS Qualidata, enhancement has three meanings. The first consists of digitising by converting paper to some electronic form. Many of the most valuable collections (e.g., classic sociology studies) exist only in paper format and require this type of enhancement to become web-enabled. Currently, data are digitised to three different levels: searchable PDF; digitised for download; and XML-tagged for online access.

The second form of enhancement of contextual material involves augmenting a data collection with additional materials to make the collection more useful to potential researchers. One of the key barriers cited by those who do not support the archiving of qualitative data, other than ethical constraints, is the implicit nature of qualitative data collection and analysis, the 'problem' of not having access to original context and reflexivity found in the original fieldwork and data analysis. How can new researchers fully engage with research materials created by someone else?

ESDS Qualidata has always argued that some high quality data is better than no data for the community, and take the position that the value of raw data can be enhanced by providing as much context as possible—provided by the original researcher or by researching more about their work. The enhancement of context involves augmenting a data collection with additional contextual materials to make the collection more useful to potential researchers, for example by adding materials that reveal both the context and the process of the original research, and depends on the nature of the collection, the complexity of the methodology and the materials available. Any content that enriches context or explains in detail how the original research was actually done is extremely valuable to researchers embarking on secondary analysis, but the extent of this enhancement varies greatly as it depends both on the nature of the collection (complexity of the methodology, for example) and on what materials are available from depositors of the research. These enhanced user guides may include samplers that provide highlights of key qualitative materials to illustrate the potential of the collection for research and teaching. Typically, the materials are assembled into a user guide and made available in bookmarked PDF for download via the catalogue with the data.

As an example, a classic sociology collection, *Mothers and Daughters: Accounts of Health in the Grandmother Generation, 1945–1978* (SN 4943) by the well known UK-based sociologist, Mildred Blaxter was released. The preparation involved: conversion of data from paper to searchable Word and RTF format by OCR, involving extensive editing and formatting of 46 interview transcripts, production of a brief Scots dialect glossary, and the compilation of extracts from an interview with the author about the experience of conducting this research.

573   The third is about providing online search and browse facilities to access raw data
574 using a web browser. The original pilot *Edwardians Online* has been expanded to
575 form the generic ESDS Qualidata Online system (www.esds.ac.uk/qualidata) cen-
576 tred on a vision for more flexible access to digital qualitative data via real-time
577 online browsing of data and utilising non-proprietary XML-based formats and sys-
578 tems for preserving, searching, and disseminating qualitative data (Corti and Barker
579 2003). The system supports more powerful resource discovery and offers greater
580 scope for searching and browsing content of data (over higher level study-related
581 metadata). Since users can search and explore (textual) content across different
582 datasets directly, data can be retrieved immediately. The advantages are that a
583 system based on common standards (based on XML) provides access to qualitative
584 data via a common interface using a standard web browser. In this system, depending
585 on the dataset, various combinations of interview transcripts, interview summaries,
586 methodology and background materials across multiple datasets are available to
587 browse and search. For example, researchers can now select and search interviews
588 from multiple datasets, including *Mothers and Daughters*, and Paul Thompson's
589 more recent study of *100 Families: Families, Social Mobility and Ageing, an Inter-*
590 *generational Approach* (Thompson et al. 1990). XML mark-up allows potential
591 linking to other various research sources of data, such as that envisaged by e-social
592 science thinking (Muhr 2000).
593   The format and mark-up of data also determine the usefulness of a collection.
594 There is a debate about the long-term value of coded data—that created in the
595 original analysis phase—mainly because the coding process is subjective, often
596 geared towards specific themes, and therefore may not be applicable to the sec-
597 ondary analyst's topic of investigation. For larger studies, however, there is a
598 stronger case for retaining the principal researcher's coded data, in order to aid
599 searching within voluminous bodies of text. Indeed, the Edwardians Collection in
600 the ESDS Qualidata Online system incorporated the structure of the existing coding
601 to provide navigation through the huge bulk of text—some 50,000 pages of interview
602 transcript.

Audio-visual materials

604 Since audio-visual materials are increasingly being created in the course of quali-
605 tative research, an archive needs to consider housing and providing access to them.
606 More recently, ESDS Qualidata has begun to develop in-house methods for pro-
607 cessing audio that includes digitisation. While the service does not handle
608 many audio-visual collections, mainly due to confidentiality issues, it is expected that
609 more researchers will be utilising digital recorders with consent obtained to archive
610 data. As such, ESDS will be looking in future to make these available on-line as part
611 of the collection.

Publicity and outreach

613 Given that, to some extent, the culture of secondary analysis of qualitative data
614 materials is still emerging, an important remit for a unit supporting qualitative data
615 is to raise the level of awareness of the availability of, and potential for, utilising

616 qualitative data sources in research, learning and teaching. Many researchers are not
617 sufficiently informed about possible methods and technical means for archiving and
618 secondary analysis, including issues of anonymisation, confidentiality and ethics as
619 well as to valid, creative and resource saving ways of how to ask 'new questions from
620 the old data'. Thus promotional efforts to draw researchers and teachers attention to
621 the possibilities of re-using data sources are of great importance. A wide range of
622 dissemination and outreach activities undertaken by ESDS Qualidata provide sup-
623 port for, and awareness of, the potential of qualitative data. Provision of a dedicated
624 help desk facility, regularly updated web pages and FAQs, and an email discussion
625 list as a forum to host debates on issues arising in the use of qualitative data are
626 productive ways of helping maintain a user community.

627 The most important promotional media is the web, key newsletters and also
628 journals. Web content should include: regularly updated data, development, news
629 and events web pages; a section on re-using data; and detailed but jargon-free
630 guidance on creating and depositing data. ESDS Qualidata's web pages on re-use
631 provides: an overview of ways of re-using data; an FAQ on re-use; and is regularly
632 updated, with a bibliography of articles addressing re-use and case studies of re-use
633 including reflections and commentary. ESDS Qualidata contributes to the regular
634 ESDS Newsletter, *UKDatabytes* which highlights new data collections, recent
635 developments in data services and training opportunities.

636 The ESDS Qualidata team also publish in other newsletters and journals where
637 time permits on various aspects of archiving, accessing and re-using qualitative data.
638 Although academic output is not required of ESDS staff, it is always desirable and is
639 nevertheless considered to be valuable in helping with the evangelist mission of
640 building new communities of practice. Finally, it is also useful to make an appear-
641 ance in newsletters and journals which will reach teachers and student populations.

642 A programme of training events and activities is also critical to expanding the user
643 base. ESDS Qualidata runs a series of workshops that aims to enhance the meth-
644 odological and substantive understanding, and secondary analytical potential, of
645 archived qualitative data sources. These include data creation workshops—how to
646 make data shareable; awareness days and road shows; tailored user and "data
647 confrontation" workshops; thematic events, by discipline or method; secondary
648 analysis of existing sources; exploration of data sources and data browsing systems;
649 and using CAQDAS software to explore shared data.

650 CAQDAS software is increasingly used by qualitative researchers to help manage
651 large amounts of primary data—interview materials, images, photos, diagrams and
652 even video and audio recordings. Added to this are notes, memos, comments and
653 coding that are created during the analytic process. Coding is a key tool for keeping
654 a record of analytic thoughts about the data and a way in which researchers develop
655 an analytical understanding and interpretation of their data. Keeping most of the
656 information in CAQDAS software and using the organising features of the packages
657 help keep it organised. The software supports the interactive coding of text and has
658 search and retrieve tools, and some enable modelling, building networks and
659 linkages across objects. However many researchers still use paper and scissors
660 methods to classify and organise their data, typically because they are not technically
661 proficient. It is thus beneficial to help promote digital resource and computer
662 software together.

663 Workshop sessions on data preparation and management have also been
664 invited from various ESRC Research Programmes, the International Sociological

665 Association (ISA) and the International Association for Social Science Information
666 Services and Technology (IASSIST) conference committee. It is vital that archives
667 holding qualitative data form part of these communities and keep up to date with the
668 developments and trends in the field.

669 Training events are always fully booked, suggesting that the supply cannot
670 even begin to meet the demand in the qualitative domain. Online guides to help
671 get users started are also useful ways to complement face-to-face training
672 resources. A good way of promoting these resources and hence methods of
673 secondary analysis is to encourage teachers to participate in evaluating training
674 resources.

So, who is using data?

676 ESDS Qualidata has witnessed an important increase in the numbers accessing
677 qualitative data, with a total of 56 requests for datasets recorded during the year
678 2003–2004, compared with an average of around 20 in previous years. This reverses
679 the trend of previous years where most substantial usage was through access to the
680 paper classic sociology collections that ESDS Qualidata had archived in the past.
681 As hoped, core usage is now through the central UKDA/ESDS catalogue showing
682 that the hard work put into processing this material is paying off. One final
683 interesting fact is a breaking of the cycle where most researchers were making use
684 of only one or two key collections and overlooking recently-released material.
685 More and more orders are being placed for the recent data. The user figures do
686 not compare with survey data as there are literally thousands of survey data col-
687 lections in the UK Data Archive's catalogue (about 3500 to some 70 qualitative),
688 but as an indication of contrast, some 17,800 survey datasets were accessed in the
689 same year.

690 Evidence from ESDS Qualidata suggests that older ''classic'' studies in the social
691 sciences can provide extremely valuable material for new research and for social
692 science teaching, both in research methods and in substantive areas. The demand for
693 the classic studies has been significant, demonstrated by the top four requested
694 datasets:

695 • SN 2000 Family Life and Work Experience Before 1918, 1870–1973—
696 Paul Thompson;
697 • SN 4723 Family Life of Old People, 1865–1955—Peter Townsend;
698 • SN 4871 Affluent Worker, 1961–1962—Frank Becchofer et al.;
699 • SN 5072 Mothers Alone, 1955–1966—Mildred Blaxter.

700 Creating and delivering more visible and packaged online electronic resources is a
701 key way to facilitate both the usage of data and training in methodological skills
702 among younger researchers and students. In order for these products to be of most
703 benefit, they need to be accompanied by substantive and methodological commen-
704 tary on the project and data, hands-on exercises, the availability of face-to-face
705 training, and finally continuing individual support. Bespoke sets of interviews have
706 been prepared on demand for teachers on a variety of courses: introductions to
707 CAQDAS packages; oral history; discourse analysis; and general research methods
708 courses.

709 **Conclusion**

710 The first part of this paper demonstrated how existing sources of qualitative data can be
711 re-used. Firstly, this is because secondary analysis makes more effective use of material
712 which is costly to collect; secondly, it enables further exploration of the data from a new
713 perspective; thirdly, it enables comparative research to be carried out in a number of
714 contexts (e.g. geographically, over time, cross-culturally); and last, it allows for veri-
715 fication of the original study. In many ways these methods parallel those that are used
716 and documented for the secondary analysis of survey data: comparative research,
717 replication or restudy; asking new questions of old data; the strengthening of scientific
718 inquiry through the open discussion of methods; help in new research designs; and
719 providing resources for training in research and substantive learning.

720 There are important gains to be made from re-analysis. At the start of a research
721 project, it can be invaluable in providing a sense of the topics which can be suc-
722 cessfully covered in interviewing, and therefore make the pilot stage of the new
723 project both more effective and also much swifter. At a later stage a comparable
724 interview set may also provide a crucial wider sample base for testing the inter-
725 pretations which are emerging. Finally, by making research data available to
726 re-analysis by others, the investigator may multiply the outcomes from this initial
727 research through the publications of others from the same material. Equally there
728 are methodological and practical difficulties in re-using data, which include under-
729 standing the coverage and context of the research; ethical and consent consider-
730 ations; unfamiliarity with the method; and the general lack of suitable data available.

731 Over the last 5 years we have witnessed a new culture of the secondary use of
732 qualitative data, which has been largely borne out of the UK data-sharing policy. It is
733 unfortunate that there is no evidence of similar research provision or research
734 cultures in other countries on this national scale, but it is highly likely that this will
735 change over the next decade.

736 This emerging research culture needs to be nurtured by acquiring relevant data and
737 documenting and presenting it in user-friendly ways that focus on quick and easy digital
738 access. Qualitative data services can help fulfil this role by encouraging a culture of
739 sharing in research practice and enabling support; developing appropriate collection
740 priorities, creating digital resources for teaching and research, and by offering support
741 and outreach activities such as training. It is also significant from the experiences of
742 well established but very focussed archives—the Mass Observation Archive in Britain
743 and the Murray Research Center in the US—that a particularly effective model is to
744 combine archiving with in-house research on the archived collections held: this gen-
745 erates both relevant acquisitions and a high level of use by researchers. Finally, looking
746 into the future, innovative on-line data access and analysis tools are very likely to both
747 encourage and facilitate the re-use of qualitative data.

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